California Organized Investment Network (COIN) CDFI Tax Credit Investment Report, 1997-2013, by CDFI

Investor Type	Investor		Year	Investment Amount	Tax Credit Amount
Asian Pacific Re	evolving Loan Fund				
Noninsurer	First Republic Bank		2005	1,800,000	360,000
Noninsurer	Wells Fargo Bank, N.A.		2001	500,000	100,000
		2 Investments	Total	2,300,000	460,000
Bridge Housing	Corporation				
Noninsurer	Citibank (West), FSB		2005	8,000,000	1,600,000
Noninsurer	Bank of America		2000	3,000,000	600,000
		2 Investments	Total	11,000,000	2,200,000
California Enviro	onmontal Bodov Fund				
Noninsurer	Onmental Redev Fund United Commercial Bank		2004	91,251	18,250
Noninsurer			2004		
	United Commercial Bank			911,535	182,307
Noninsurer	United Commercial Bank		2003	300,000	60,000
		3 Investments	Total	1,302,786	260,557
	ness Finance Corporation				
Noninsurer	CapitalSource Bank		2008	100,000	20,000
Noninsurer	CapitalSource Bank		2008	100,000	20,000
		2 Investments	Total	200,000	40,000
Clearinghouse (CDFI				
Noninsurer	California Republic Bank		2011	100,000	20,000
Noninsurer	First Bank		2011	100,000	20,000
Noninsurer	Opus Bank		2011	500,000	100,000
Noninsurer	Sunwest Bank		2010	250,000	50,000
Noninsurer	California United Bank		2009	1,000,000	200,000
Noninsurer	CaptialSource Bank		2009	500,000	100,000
Noninsurer	City National Bank		2009	200,000	40,000
Noninsurer	U.S. Bancorp CDC		2009	50,000	10,000
Noninsurer	CapitalSource Bank		2008	100,000	20,000
Noninsurer	CapitalSource Bank		2008	100,000	20,000
Noninsurer	CapitalSource Bank		2008	100,000	20,000
Noninsurer	Wachovia		2007	200,000	40,000
Noninsurer	First Bank & Trust		2006	100,000	20,000
Noninsurer	Fremont Investment & Loan		2006	100,000	20,000
Noninsurer	Fremont Investment & Loan		2006	100,000	20,000
Noninsurer	California Bank and Trust		2004	200,000	40,000
Noninsurer	City National Bank		2004	200,000	40,000
Noninsurer	Fremont Investment & Loan		2003	200,000	40,000
Noninsurer	Fremont Investment & Loan		2003	100,000	20,000
Noninsurer	Fremont Investment & Loan		2003	100,000	20,000
Noninsurer	Fremont Investment & Loan		2003	100,000	20,000
Noninsurer	Western Financial Bank		2003	200,000	40,000
Noninsurer	Western Financial Bank		2002	100,000	20,000
Noninsurer	Farmers & Merchants Bank		2002	200,000	40,000
Noninsurer	General Bank		2000	200,000	
Noninsurer	Jackson Federal Bank		2000		40,000
				200,000	40,000
Noninsurer	Pacific Century Bank		2000	200,000	40,000
Noninsurer Noninsurer	Peoples Bank of California United Commercial Bank		2000 2000	200,000 200,000	40,000
ivoriirisurer	Onited Commercial Dank		∠000	∠00,000	40,000

	1 '	, ,		
–			Investment	Tax Credit
Investor Type	Investor	Year	Amount	Amount
Noninsurer	US Bank	2000	200,000	40,000
Noninsurer	Washington Mutual Bank	2000	300,000	60,000
Noninsurer	Western Financial Bank	2000	200,000	40,000
Noninsurer	City National Bank	1999	200,000	40,000
Noninsurer	Eldorado Bank (now Calif Bank & Trust)	1999	100,000	20,000
Noninsurer	Fremont Investment & Loan	1999	200,000	40,000
Noninsurer	Imperial Bank	1999	100,000	20,000
Noninsurer	Pacific Century Bank	1999	50,000	10,000
Noninsurer	Union Bank of California	1999	500,000	100,000
Noninsurer	Chase Manhattan Bank	1998	100,000	20,000
Noninsurer	Eldorado Bank (now Calif Bank & Trust)	1998	100,000	20,000
Noninsurer	Fremont Investment & Loan	1998	100,000	20,000
	41 Investmen	ts Total	8,050,000	1,610,000
	NMTC (Sub 2), LLC	2004	40,000,000	0.000.000
Noninsurer	Commercial Capital Bank, FSB	2004	10,000,000	2,000,000
	1 Investme	nt Total	10,000,000	2,000,000
ommunity Ban	k of the Bay			
Insurer	Civil Service Employees Insurance Company	2001	50,000	10,000
Insurer	C.M. Life Insurance Company	2000	100,000	20,000
Insurer	Massachusetts Mutual Life Insurance Company	2000	100,000	20,000
Insurer	MML Bay State Life Insurance Company	2000	100,000	20,000
Insurer	PMI Mortgage Insurance Co.	2000	100,000	20,000
	5 Investmen		450,000	90,000
			,	•
ommunity Con				
Insurer	C.M. Life Insurance Company	2011	100,000	20,000
Insurer	Massachusetts Mutual Life Insurance Company	2011	100,000	20,000
Insurer	MML Bay Life Insurance Company	2011	100,000	20,000
Insurer	American Auto Insurance Co.	2007	100,000	20,000
Insurer	Chicago Insurance Company	2007	100,000	20,000
Insurer	Civil Service Employee Ins. Co.	2007	50,000	10,000
Insurer	CSE Safeguard Insurance Co.	2007	50,000	10,000
Insurer	National Surety Corporation	2007	100,000	20,000
Insurer	C.M. Life Insurance Company	2006	100,000	20,000
Insurer	Massachusetts Mutual Life Insurance Company	2006	100,000	20,000
Insurer	MML Bay State Life Insurance Company	2006	100,000	20,000
Insurer	Associated Indemnity Corporation	2005	100,000	20,000
Insurer	Fireman's Fund Insurance Company	2005	100,000	20,000
Noninsurer	Mission Community Bank	2003	100,000	20,000
Insurer	PMI Mortgage Insurance Co.	2000	100,000	20,000
mourci	15 Investmen		1,400,000	280,000
	ancial Resource Center			
Noninsurer	Cathay Bank	2004	100,000	20,000
Noninsurer	First Commercial Bank	2007	50,000	10,000
Noninsurer	Nara Bank	2007	100,000	20,000
Noninsurer	Washington Mutual Comm Dev. Corp	2003	500,000	100,000
Noninsurer Noninsurer	Washington Mutual Comm Dev. Corp Wells Fargo Bank, N.A.	2003 2001	500,000 75,000	100,000 15,000

				Investment	Tax Credit	
Investor Type	Investor		Year	Amount	Amount	
Comunidades F	ederal Credit Union					
Noninsurer	Pacific Century Bank		1999	50,000	10,000	
	1 Inve	stment	Total	50,000	10,000	
Corporation for	Supportive Housing					
Insurer	MetLife Investors USA Insurance Company		2013	6,000,000	1,200,000	
	1 Inve	stment	Total	6,000,000	1,200,000	
Enterprise Com	munity Investment					
Insurer	AAA		2012	1,816,475	363,295	
Insurer	United Health Care		2012	2,748,525	549,705	
	2 Inves	ments	Total	4,565,000	913,000	
Faith Based Fed	eral Credit Union					
Insurer	CMFG Life Insurance Company		2012	250,000	50,000	
Noninsurer	Private Individual		2009	50,000	10,000	
Noninsurer	Private Individual		2009	50,000	10,000	
	3 Inves	ments	Total	350,000	70,000	
Fame Renaissar	nce Equity Fund					
Noninsurer	Pacific Century Bank		1999	50,000	10,000	
Noninsurer	Private Individual		1998	250,000	50,000	
Noninsurer	Wells Fargo Bank, N.A.		1998	2,500,000	500,000	
	3 Inves	ments	Total	2,800,000	560,000	
Fund for Childre	en and Communities, LLC					
Insurer	21st Century Insurance Company		2006	329,643	65,929	
Insurer	Allstate Insurance Company		2006	384,623	76,925	
Insurer	Allstate Insurance Company		2006	239,765	47,953	
Insurer	Farmers Insurance Exchange		2006	384,623	76,925	
Insurer	Farmers Insurance Exchange		2006	239,765	47,953	
Insurer	Nationwide Mutual Insurance Company		2006	384,623	76,925	
Insurer	Nationwide Mutual Insurance Company		2006	445,257	89,051	
Insurer	Pacific Life Insurance Company		2006	384,623	76,925	
Insurer	Pacific Life Insurance Company		2006	239,765	47,953	
Insurer	Safeco Insurance Company of America		2006	329,643	65,929	
Insurer	Safeco Insurance Company of America		2006	205,492	41,098	
Insurer	State Farm Mutual Automobile Insurance Company	/	2006	384,623	76,925	
Insurer	State Farm Mutual Automobile Insurance Company		2006	239,765	47,953	
	13 Inves	ments	Total	4,192,207	838,441	
Housina Trust o	f Santa Clara County					
Noninsurer	Silicon Valley Bank		2011	1,000,000	200,000	
	-	stment	Total	1,000,000	200,000	
Impact Commun	nity Capital CDE, LLC					
Insurer	Farmers Insurance Exchange		2011	3,500,000	700,000	
Insurer	Pacific Life Insurance Company		2011	1,000,000	200,000	
Insurer	State Farm Mutual Automobile Insurance Company	,	2011	1,000,000	200,000	
	3 Inves		Total	5,500,000	1,100,000	

Investor Type	Investor	Year	Investment Amount	Tax Credit Amount
Impact Communi	ty Capital LLC			
Insurer	Farmers Insurance Exchange	2011	3,500,000	700,000
Insurer	Pacific Life Insurance Company	2011	1,000,000	200,000
Insurer	State Farm Mutual Automobile Insurance Company	2011	1,000,000	200,000
Insurer	First Colony Life Insurance Company	2003	204,512	40,902
Insurer	General Electric Capital Assurance Company	2003	370,488	74,098
Insurer	Nationwide Mutual Insurance Company	2001	402,466	80,493
Insurer	State Farm Mutual Automobile Insurance Company	2001	171,361	34,272
Insurer	21st Century Insurance Company	2000	168,905	33,781
Insurer	Allstate Insurance Company	2000	197,076	39,415
Insurer	Farmers Insurance Exchange	2000	197,076	39,415
Insurer	Pacific Life Insurance Company	2000	197,076	39,415
Insurer	PMI Mortgage Insurance Co.	2000	56,310	11,262
Insurer	Safeco Insurance Company of America	2000	168,905	33,781
	13 Investments	Total	7,634,175	1,526,835
Inglewood NHS				
	City National Bank	2004	100,000	20,000
	Western Financial Bank	2004	100,000	20,000
	Western Financial Bank	2004	50,000	10,000
	City National Bank	1999	100,000	20,000
1101111100101	4 Investments	Total	350,000	70,000
				10,000
	Support Corp (LISC)	2000	200.000	00.000
	City National Bank	2009	300,000	60,000
	City National Bank	2004	300,000	60,000
	Metropolitan Life Insurance Company	2002	1,000,000	200,000
	City National Bank	1999	300,000	60,000
Noninsurer	Pacific Century Bank	1999 T -1-1	50,000	10,000
	5 Investments	Total	1,950,000	390,000
	hborhood Housing Services			
	City National Bank	2009	100,000	20,000
	CapitalSource Bank	2008	100,000	20,000
	CapitalSource Bank	2008	100,000	20,000
	Vineyard Bank	2006	250,000	50,000
	City National Bank	2004	100,000	20,000
	Western Financial Bank	2004	100,000	20,000
	Western Financial Bank	2004	250,000	50,000
	Fremont Investment & Loan	2003	100,000	20,000
	Fremont Investment & Loan	2003	100,000	20,000
Noninsurer	City National Bank	1999	100,000	20,000
Noninsurer	Republic Bank California N.A.	1999	50,000	10,000
	11 Investments	Total	1,350,000	270,000
Low Income Inve	stment Fund			
	Blue Shield of California Life & Health Insurance Company	2012	1,000,000	200,000
Insurer	Dido Chiola di California Elio a l'Icalai incarance Company	-		
Insurer Noninsurer	First Republic Bank	2011	4,000,000	800,000
Noninsurer				

Investor Type	Investor		Year	Investment Amount	Tax Credi Amount
Noninsurer	Wachovia Bank		2008	1,500,000	300,000
Noninsurer	Citicorp USA, Inc.		2007	4,000,000	800,000
Insurer	Metropolitan Life Insuance Company		2006	3,000,000	600,000
Noninsurer	California Federal Bank, FSB		2002	5,000,000	1,000,000
Insurer	Metropolitan Life Insurance Company		2002	1,000,000	200,000
Noninsurer	Bank of America		2001	5,000,000	1,000,000
Noninsurer	Mechanics Bank		2000	1,000,000	200,000
Noninsurer	Providian Financial Corp.		1998	133,333	26,667
Noninsurer	Bank of America		1997	255,004	51,001
	24	13 Investments	Total	34,288,337	6,857,667
rin Workforce	Housing Trust				
Noninsurer	Mechanics Bank		2011	200,000	40,000
		1 Investment	Total	200,000	40,000
ssion Commu	nity Bank				
Insurer	American Auto Insurance Co.		2007	100,000	20,000
Insurer	Chicago Insurance Company		2007	100,000	20,000
Insurer	National Surety Corporation		2007	100,000	20,000
Insurer	American Insurance Company		2005	100,000	20,000
Insurer	Associated Indemnity Corporation		2005	100,000	20,000
Insurer	Firemen's Fund Insurance Company		2005	100,000	20,000
Noninsurer	Private Individual		2003	100,000	20,000
					140,000
		7 Investments	Total	700,000	140,000
B Capital Imp	pact	7 Investments	lotai	700,000	140,000
B Capital Imp		7 Investments	2009	5,000,000	1,000,000
	pact Metropolitan Life Insurance	7 Investments 1 Investments			
	Metropolitan Life Insurance		2009	5,000,000	1,000,000
Insurer	Metropolitan Life Insurance		2009	5,000,000	1,000,000
Insurer	Metropolitan Life Insurance Bancorp		2009 Total	5,000,000 5,000,000	1,000,000
Insurer ighborhood E Insurer	Metropolitan Life Insurance Bancorp American Insurance Company		2009 Total 2005	5,000,000 5,000,000 100,000	1,000,000 1,000,000 20,000
Insurer ighborhood E Insurer Insurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation		2009 Total 2005 2005	5,000,000 5,000,000 100,000 100,000	1,000,000 1,000,000 20,000 20,000
ighborhood E Insurer Insurer Insurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company		2009 Total 2005 2005 2005	5,000,000 5,000,000 100,000 100,000	1,000,000 1,000,000 20,000 20,000 20,000
ighborhood E Insurer Insurer Insurer Noninsurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank		2009 Total 2005 2005 2005 2004	5,000,000 5,000,000 100,000 100,000 200,010 500,000	1,000,000 1,000,000 20,000 20,000 40,002 100,000
ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer	Metropolitan Life Insurance Sancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA		2009 Total 2005 2005 2005 2004 2004	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000
ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Noninsurer Insurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company		2009 Total 2005 2005 2005 2004 2004 2004 2004	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Noninsurer Insurer Insurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp		2009 Total 2005 2005 2005 2004 2004 2004 2004 2003	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Insurer Noninsurer Insurer Noninsurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank	1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2004 2003 2001	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Insurer Noninsurer Noninsurer Noninsurer Noninsurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank Eldorado Bank (now Calif Bank & Trust)	1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2004 2003 2001 2000	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000 20,000
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Insurer Noninsurer Insurer Noninsurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank	1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2004 2003 2001	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Insurer Noninsurer Noninsurer Noninsurer Noninsurer Insurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank Eldorado Bank (now Calif Bank & Trust) PMI Mortgage Insurance Co.	1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2004 2003 2001 2000 2000	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000 100,000	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000 20,000 20,000
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Insurer Noninsurer Noninsurer Noninsurer Noninsurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank Eldorado Bank (now Calif Bank & Trust) PMI Mortgage Insurance Co.	1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2004 2003 2001 2000 2000	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000 100,000	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000 20,000 20,000
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Noninsurer Noninsurer Noninsurer Insurer Insurer Insurer Insurer Insurer	Metropolitan Life Insurance Bancorp American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank Eldorado Bank (now Calif Bank & Trust) PMI Mortgage Insurance Co.	1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2003 2001 2000 2000 Total	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000 100,000 2,805,015	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000 20,000 20,000 561,003
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Noninsurer Noninsurer Noninsurer Insurer Insurer Insurer Insurer Insurer Insurer	American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank Eldorado Bank (now Calif Bank & Trust) PMI Mortgage Insurance Co.	1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2000 2000 Total 2012 2012	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000 100,000 2,805,015	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000 20,000 20,000 561,003
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Noninsurer Noninsurer Noninsurer Insurer Insurer Insurer Insurer Insurer Insurer	American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank Eldorado Bank (now Calif Bank & Trust) PMI Mortgage Insurance Co. Iational Bank American Automobile Insurance Company CSE Safeguard Insurance Company	1 Investments 1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2000 2000 Total 2012 2012 2012	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000 100,000 2,805,015	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000 20,000 20,000 561,003
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Noninsurer Noninsurer Noninsurer Insurer	American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank Eldorado Bank (now Calif Bank & Trust) PMI Mortgage Insurance Co. Iational Bank American Automobile Insurance Company CSE Safeguard Insurance Company CSE Service Employees Insurance Cor	1 Investments 1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2000 2000 Total 2012 2012 2012 2012	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000 100,000 2,805,015	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 20,000 20,000 20,000 20,000 561,003
Insurer ighborhood E Insurer Insurer Insurer Noninsurer Noninsurer Insurer Noninsurer Noninsurer Noninsurer Insurer Insurer Insurer Insurer Insurer Insurer	American Insurance Company Associated Indemnity Corporation Firemen's Fund Insurance Company San Diego National Bank Union Bank of California Wells Fargo Bank, NA Zenith Insurance Company Mission Community Bancorp First Republic Bank Eldorado Bank (now Calif Bank & Trust) PMI Mortgage Insurance Co. Iational Bank American Automobile Insurance Company CSE Safeguard Insurance Company	1 Investments 1 Investments	2009 Total 2005 2005 2005 2004 2004 2004 2004 2000 2000 Total 2012 2012 2012	5,000,000 5,000,000 100,000 100,000 200,010 500,000 1,000,000 255,005 250,000 100,000 100,000 2,805,015	1,000,000 1,000,000 20,000 20,000 40,002 100,000 200,000 51,001 50,000 20,000 20,000 20,000 561,003

Investor Type	Investor		Year	Investment Amount	Tax Credit Amount
Noninsurer	American Auto Insurance Co.		2007	100,000	20,000
		8 Investments	Total	1,550,000	310,000
eighborhood h	Housing Services of Orange Count	y			
Noninsurer	Sunwest Bank		2012	250,000	50,000
Noninsurer	First Bank		2011	100,000	20,000
Noninsurer	CaptialSource Bank		2009	200,000	40,000
Noninsurer	CapitalSource Bank		2008	100,000	20,000
Noninsurer	Washington Mutual Bank		2007	1,000,000	200,000
Noninsurer	First Bank		2006	100,000	20,000
Noninsurer	Fremont Investment & Loan		2006	100,000	20,000
Noninsurer	Fremont Investment & Loan		2006	100,000	20,000
Noninsurer	First Federal Bank of California		2004	100,000	20,000
Noninsurer	Western Financial Bank		2004	50,000	10,000
Noninsurer	Western Financial Bank		2004	300,000	60,000
Noninsurer	Fremont Investment & Loan		2003	100,000	20,000
		12 Investments	Total	2,500,000	500,000
ortheast Comr	nunity Federal Credit Union				
Insurer	CMFG Life Insurance Company		2012	250,000	50,000
Insurer	CUMIS Insurance Society, Inc.		2012	250,000	50,000
Noninsurer	Private Individual		2012	50,000	10,000
Noninsurer	Private Individual		2010	50,000	10,000
Noninsurer	Private Individual		2010	50,000	10,000
Noninsurer	Cathay Bank		2007	100,000	20,000
Noninsurer	Western Financial Bank		2007	100,000	20,000
Noninsurer	HSBC Bank USA, NA		2004	100,000	20,000
Noninsurer	Cathay Bank		2002	100,000	20,000
Noninsurer	Wells Fargo Bank, N.A.		2002	100,000	20,000
Noninsurer	Western Financial Bank		2002	100,000	20,000
Insurer	CSE Safeguard Insurance Company		2001	50,000	10,000
Insurer	PMI Mortgage Insurance Co.		2000	100,000	20,000
		13 Investments	Total	1,400,000	280,000
orthern Califo	rnia Community Loan Fund				
Noninsurer	Private Individual		2013	200,000	40,000
Noninsurer	Private Individual		2013	100,000	20,000
Insurer	JPMorgan Chase Bank		2012	600,000	120,000
Noninsurer	Private Individual		2011	50,000	10,000
Noninsurer	Private Individual		2010	50,000	10,000
Noninsurer	Private Individual		2009	50,000	10,000
Noninsurer	private individual		2008	75,000	15,000
Noninsurer	United Commercial Bank		2007	250,000	50,000
Noninsurer	private individual		2006	50,000	10,000
Noninsurer	Wells Fargo Bank Comm Dev Corp		2006	750,000	150,000
Noninsurer	Wells Fargo Bank, N.A.		2002	750,000	150,000
Noninsurer	Bank of America		2001	1,000,000	200,000
Noninsurer	Private Individual		2000	80,000	16,000
Noninsurer	California Federal Bank, FSB		1999	200,000	40,000
Noninsurer	Private Individual		1999	100,000	20,000
		15 Investments	Total	4,305,000	861,000

Investment Total 500,000 100	Investor Type	Investor		Year	Investment Amount	Tax Credi Amount
Investment Total 500,000 100	OBDC Small Bu	siness Finance				
Noninsurer Silicon Valley Bank 2010 250,000 50	Noninsurer	The Mechanics Bank		2007	500,000	100,000
Noninsurer Silicon Valley Bank 2010 250,000 50			1 Investment	Total	500,000	100,000
Noninsurer	Opportunity Fur	nd Northern California				
Noninsurer	Noninsurer	Silicon Valley Bank		2010	250,000	50,000
Noninsurer	Noninsurer	CaptialSource Bank		2009	300,000	60,000
Noninsurer Fremont Investment & Loan 2006 100,000 20	Noninsurer	Heritage Bank of Commerce		2009	50,000	10,000
Noninsurer Fremont Investment & Loan 2006 100,000 20	Noninsurer	CapitalSource Bank		2008	100,000	20,000
Noninsurer	Noninsurer	Fremont Investment & Loan		2006	100,000	20,000
Noninsurer	Noninsurer	Fremont Investment & Loan		2006	100,000	20,000
Noninsurer	Noninsurer	Fremont Investment & Loan		2006	100,000	20,000
Noninsurer The Summit National Bank 2004 50,000 10	Noninsurer	Heritage Bank of Commerce		2004	150,000	30,000
Noninsurer Fremont Investment & Loan 2003 100,000 20	Noninsurer	Heritage Bank of Commerce		2004	50,000	10,000
Noninsurer Cupertino Bank 1999 125,000 25	Noninsurer	The Summit National Bank		2004	50,000	10,000
Noninsurer General Bank 1999 100,000 20	Noninsurer	Fremont Investment & Loan		2003	100,000	20,000
Noninsurer General Bank 1999 100,000 20	Noninsurer	Cupertino Bank		1999	125,000	25,000
Noninsurer Heritage Bank of Commerce 1999 50,000 10	Noninsurer	General Bank		1999	100,000	20,000
Noninsurer Heritage Bank of Commerce 1999 150,000 30 Noninsurer Mid-Peninsula Bank 1999 125,000 25 Noninsurer The Summit National Bank 1999 50,000 10 17 Investments 18 Investments 18	Noninsurer	Heritage Bank of Commerce		1999	50,000	10,000
Noninsurer Mid-Peninsula Bank 1999 125,000 25	Noninsurer			1999		30,000
Noninsurer The Summit National Bank 1999 50,000 10	Noninsurer	-		1999	125,000	25,000
Pacific Coast Regional SBDC	Noninsurer	The Summit National Bank		1999	50,000	10,000
Noninsurer California United Bank 2013 75,000 15			17 Investments	Total		390,000
Noninsurer	Pacific Coast Re	egional SBDC				
Noninsurer Alliance Bank 2007 395,000 798	Noninsurer	California United Bank		2013	75,000	15,000
Noninsurer Washington Mutual Bank 2007 1,500,000 300 Noninsurer Comerica Bank 2005 50,000 10 Noninsurer HSBC Bank USA 2003 500,000 100 Noninsurer Wells Fargo Bank Community Dev. Corp. 2002 500,000 100 Noninsurer Washington Mutual Bank 2000 1,000,000 200 **Noninsurer Washington Mutual Bank 2000 1,000,000 200 **Noninsurer Private Individual 2004 50,000 10 **Noninsurer Private Individual 2003 50,000 10 **Noninsurer Wells Fargo Bank, NA 2003 100,000 20 ***Rural Community Assistance	Noninsurer	Private Bank of California		2012	250,000	50,000
Noninsurer Comerica Bank 2005 50,000 100	Noninsurer	Alliance Bank		2007	395,000	79,000
Noninsurer HSBC Bank USA 2003 500,000 100	Noninsurer	Washington Mutual Bank		2007	1,500,000	300,000
Noninsurer Wells Fargo Bank Community Dev. Corp. 2002 500,000 100 Noninsurer Washington Mutual Bank 2000 1,000,000 200 8 Investments Total 4,270,000 854 People's Community Partnership Federal Credit Union Noninsurer Private Individual 2004 50,000 10 Noninsurer Bank of the West 2003 100,000 20 Noninsurer HSBC Bank USA 2003 50,000 10 Noninsurer Mission Community Bank 2003 100,000 20 Noninsurer Private Individual 2003 50,000 10 Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 Total 550,000 110 Rural Community Assistance Corp (RCAC) Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117 Noninsurer JPMorgan Chase JPMOrg	Noninsurer	Comerica Bank		2005	50,000	10,000
Noninsurer Washington Mutual Bank 2000 1,000,000 200 854	Noninsurer	HSBC Bank USA		2003	500,000	100,000
Rural Community Assistance Corp (RCAC) Romunity Assistance Corp (RCAC) Rural Community Assistance Corp (RCAC) Romunity Assistance Corp (RCAC) Romunity Assistance Corp (RCAC) Roman	Noninsurer	Wells Fargo Bank Community Dev. Corp.		2002	500,000	100,000
People's Community Partnership Federal Credit Union Noninsurer Private Individual 2004 50,000 10 Noninsurer Bank of the West 2003 100,000 20 Noninsurer HSBC Bank USA 2003 50,000 10 Noninsurer Mission Community Bank 2003 100,000 20 Noninsurer Private Individual 2003 50,000 10 Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) 2013 1,000,000 200 Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117	Noninsurer	Washington Mutual Bank		2000	1,000,000	200,000
Noninsurer Private Individual 2004 50,000 10 Noninsurer Bank of the West 2003 100,000 20 Noninsurer HSBC Bank USA 2003 50,000 10 Noninsurer Mission Community Bank 2003 100,000 20 Noninsurer Private Individual 2003 50,000 10 Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) 2013 1,000,000 200 Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117			8 Investments	Total	4,270,000	854,000
Noninsurer Private Individual 2004 50,000 10 Noninsurer Bank of the West 2003 100,000 20 Noninsurer HSBC Bank USA 2003 50,000 10 Noninsurer Mission Community Bank 2003 100,000 20 Noninsurer Private Individual 2003 50,000 10 Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) 2013 1,000,000 200 Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117	People's Comm	unity Partnership Federal Credit Unio	on			
Noninsurer Bank of the West 2003 100,000 20 Noninsurer HSBC Bank USA 2003 50,000 10 Noninsurer Mission Community Bank 2003 100,000 20 Noninsurer Private Individual 2003 50,000 10 Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117	-			2004	50,000	10,000
Noninsurer HSBC Bank USA 2003 50,000 10 Noninsurer Mission Community Bank 2003 100,000 20 Noninsurer Private Individual 2003 50,000 10 Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) Noninsurer 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117		Bank of the West				20,000
Noninsurer Mission Community Bank 2003 100,000 20 Noninsurer Private Individual 2003 50,000 10 Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117		HSBC Bank USA				10,000
Noninsurer Private Individual 2003 50,000 10 Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) 2013 1,000,000 200 Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117						20,000
Noninsurer US Bancorp Community Dev Corp 2003 100,000 20 Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) Value 2013 1,000,000 200 Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117						10,000
Noninsurer Wells Fargo Bank, NA 2003 100,000 20 7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) Noninsurer California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117						20,000
7 Investments Total 550,000 110 Rural Community Assistance Corp (RCAC) California United Bank 2013 1,000,000 200 Noninsurer JPMorgan Chase Bank 2012 585,000 117		· · · · · · · · · · · · · · · · · · ·				20,000
NoninsurerCalifornia United Bank20131,000,000200NoninsurerJPMorgan Chase Bank2012585,000117		, , , , , , , , , , , , , , , , , , ,	7 Investments			110,000
NoninsurerCalifornia United Bank20131,000,000200NoninsurerJPMorgan Chase Bank2012585,000117	Rural Communi	ty Assistance Corp (RCAC)				
Noninsurer JPMorgan Chase Bank 2012 585,000 117		• • • •		2013	1.000.000	200,000
						117,000
	Noninsurer	JP Morgan Chase		2012	415,000	83,000
·						100,000

Investor Type	Investor		Year	Investment Amount	Tax Credi Amount
Noninsurer	Washington Mutual Bank		2006	376,165	75,233
Noninsurer	California Bank & Trust		2004	100,000	20,000
Noninsurer	Washington Mutual Comm. Dev.		2004	848,827	169,765
Noninsurer	Bank of America		2001	2,500,000	500,000
Noninsurer	Washington Mutual Comm. Dev.		2001	151,173	30,235
Noninsurer	Eldorado Bank (now Calif Bank & Trust)		1999	100,000	20,000
		10 Investments	Total	6,576,166	1,315,233
n Luis Ohisne	County Housing Trust Fund				
Noninsurer	Mid-State Bank & Trust		2007	100,000	20,000
Normiourer	Wild State Barin a Trust	1 Investment	Total	100,000	20,000
inta Cruz Com	nmunity Credit Union				
Insurer	California Mutual Insurance Co		2009	100,000	20,000
Insurer	Mid-State Mutual Insurance Company		2009	100,000	20,000
Noninsurer					
Nonnisurei	Mission Community Bank	2 lave et aceste	2003	100,000	20,000
		3 Investments	Total	300,000	60,000
-	al Credit Union California Division				
Noninsurer	Private Investor		2013	50,000	10,000
Noninsurer	Private Investor		2013	50,000	10,000
Noninsurer	Private Investor		2013	100,000	20,000
Noninsurer	Private Investor		2013	280,000	56,000
Noninsurer	Private Investor		2013	118,677	23,735
Noninsurer	Private Investor		2013	100,000	20,000
Noninsurer	Private Investor		2013	150,000	30,000
Noninsurer	Private Investor		2013	70,000	14,000
Noninsurer	Private Investor		2013	50,000	10,000
Noninsurer	Private Investor		2013	250,000	50,000
Noninsurer	Private Investor		2013	100,000	20,000
Noninsurer	Private Investor		2013	500,000	100,000
Noninsurer	Private Investor		2013	500,000	100,000
Noninsurer	Private Investor		2013	80,000	16,000
Noninsurer	Private Investor		2013	226,323	45,265
Insurer	CMFG Life Insurance Company		2012	250,000	50,000
Insurer	CUMIS Insurance Society, Inc.		2012	250,000	50,000
Noninsurer	Private Individual		2011	235,000	47,000
Noninsurer	Private Individual		2011	175,000	35,000
Noninsurer	Private Individual		2011	120,000	24,000
Noninsurer	Private Individual		2011	100,000	20,000
Noninsurer	Private Individual		2011	85,000	17,000
Noninsurer	Private Individual		2011	50,000	10,000
Noninsurer	Private Individual		2011	50,000	10,000
Noninsurer	Private Individual		2010	100,000	20,000
Noninsurer	Private Individual		2010	80,000	16,000
Noninsurer	Private Individual		2010	70,000	
					14,000
Noninsurer	Private Individual		2010	50,000	10,000
Noninsurer	Private Individual		2010	50,000	10,000
Noninsurer	Private Individual		2010	50,000	10,000
Noninsurer	Private Individual		2010	50,000	10,000
Noninsurer	Private Individual		2010	50,000	10,000

Investor Type	Investor	Year	Investment Amount	Tax Credit
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2010	50,000	10,000
Noninsurer	Private Individual	2009	200,000	40,000
Noninsurer	Private Individual	2009	150,000	30,000
Noninsurer	Private Individual	2009	100,000	20,000
Noninsurer	Private Individual	2009	100,000	20,000
Noninsurer	Private Individual	2009	100,000	20,000
Noninsurer	Private Individual	2009	50,000	10,000
Noninsurer	Private Individual	2009	50,000	10,000
Noninsurer	U.S. Bancorp Community Development Corporation	2008	100,000	20,000
Noninsurer	Private Individual	2008	50,000	10,000
	51 Investments	Total	5,840,000	1,168,000
oCal Reinvesti	ment CDFI			
Noninsurer	CapitalSource Bank	2009	50,000	10,000
Noninsurer	CapitalSource Bank	2008	100,000	20,000
Noninsurer	CapitalSource Bank	2008	100,000	20,000
Noninsurer	CapitalSource Bank	2008	100,000	20,000
Noninsurer	CapitalSource Bank	2008	100,000	20,000
Noninsurer	Fremont Investment & Loan	2006	100,000	20,000
Noninsurer	Fremont Investment & Loan	2006	100,000	20,000
	7 Investments	Total	650,000	130,000
ELACU Comm	unity Capital			
Noninsurer	Nara Bank	2004	100,000	20,000
Noninsurer	Pacific Western National Bank	2004	100,000	20,000
Noninsurer	Wilshire State Bank	2004	100,000	20,000
	3 Investments	Total	300,000	60,000
	325 CDFI Tax Credit Investments, 1997-2013	Total	145,053,685	29,010,736